CHRIS User Guide: Completing a Mid-Year Appraisal

CHRIS Responsibility Required: Manager Self-Service

Module Overview

Purpose

As part of the automation of the APPAS policy, supervisors can manage performance evaluations and appraisals through CHRIS Self-service. This automation includes issuing performance plans, and conducting mid-year/interim/annual appraisals. Once the mid-year appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the mid-year in the Appraisals section of APPAS. This guide offers instructions for completing the mid-year appraisal.

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Locating the Appraisal

After logging in to CHRIS, click on the **GSA Manager Self-Service** responsibility, then select the **Update/Appraise Employee Performance and Submit Appraisal** menu option.
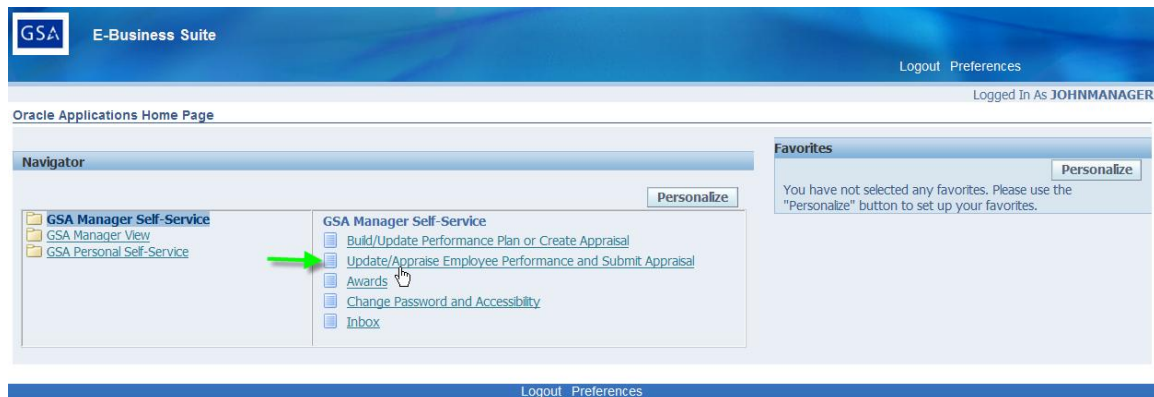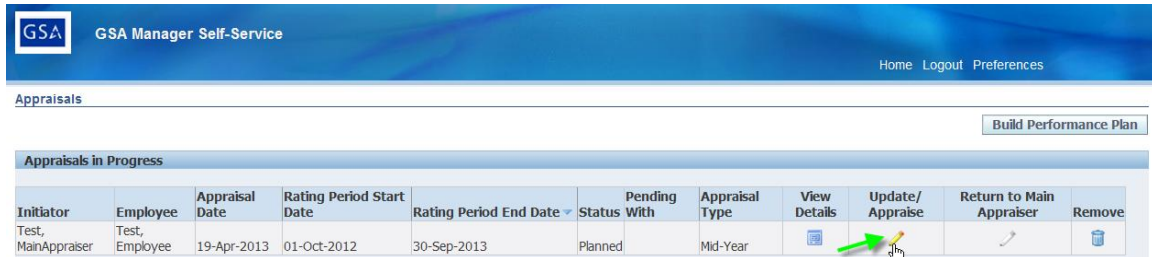

This will take you to the **Appraisals** screen, which is separated into two sections: **Appraisals in Progress** and **Completed Appraisals**. **Appraisals in Progress** gives you a list of Appraisals that you created in **Build Performance Plan**. These are the appraisals we will be working with, in this user guide.
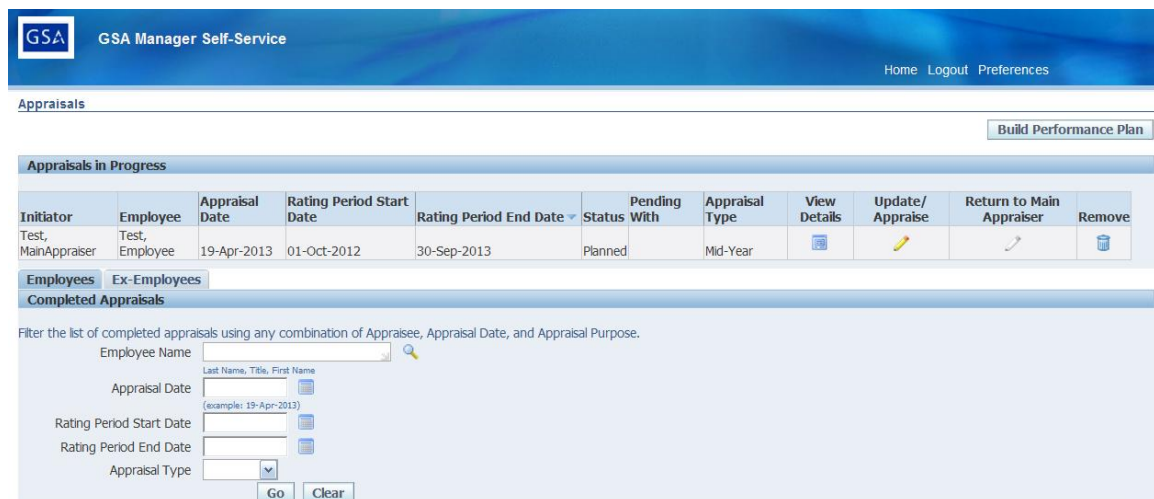
Completing the Appraisal

To begin the process of completing the appraisal, select the **Update/Appraise** icon 🖊, in the row of the respective employee.
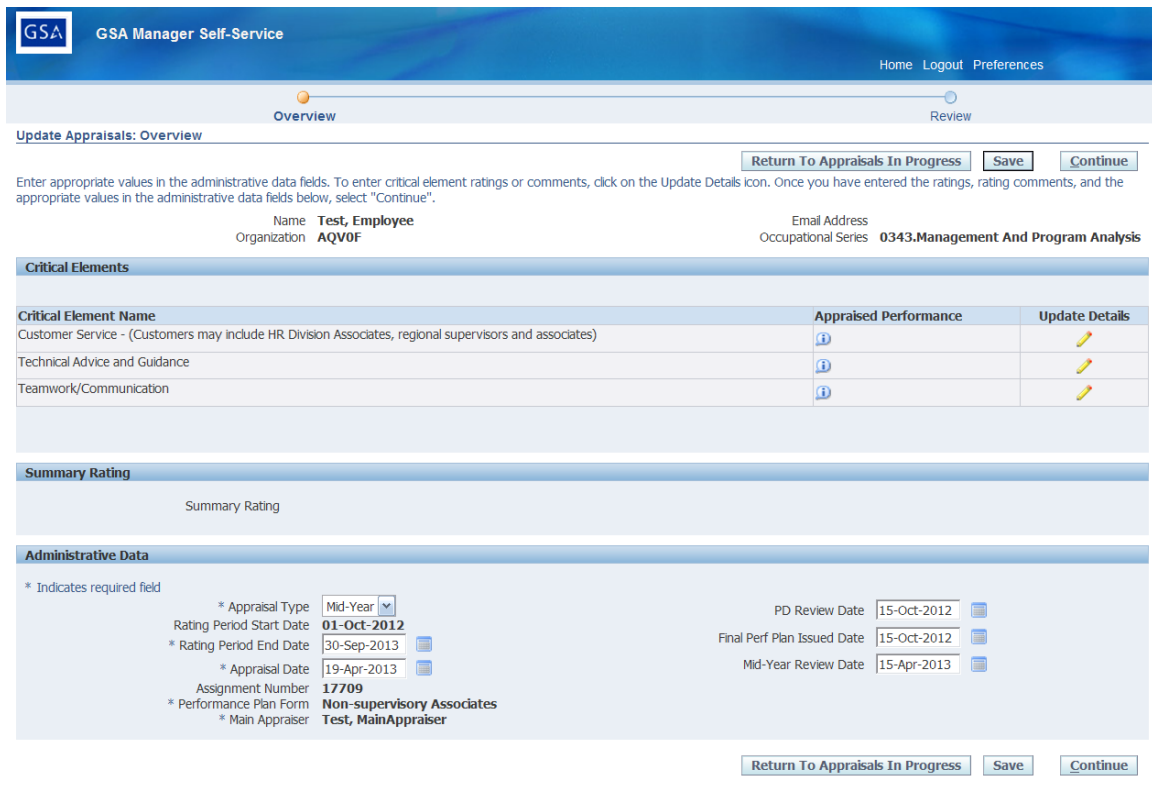

The **Update Appraisals: Overview** screen allows the user to modify the **Appraisal Type**, **Rating Period End Date**, **Appraisal Date**, **PD Review Date**, **Final Performance Plan Issued Date**, and **Mid-Year Review Date**. Once these dates are confirmed as accurate, select the **Save** button. Next, begin the rating process by selecting the **Update Details** icon 🖊, in the row of the 1st critical element.

You can select a rating level (rating level is required only for AFGE employees), and include your comments for the employee's performance, in regard to the critical element. You may type these comments directly into the field, or copy and paste them from a Word document. Once this is complete, select the **Save and Update Next** button, to rate the next critical element.

Important: The **Appraiser Comments** field will accept the first 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

Continue the process of selecting a rating, typing in comments, and clicking the **Save and Update Next** button, until you reach the last critical element. Once you reach the last critical element, select the **Save** button, after including your rating and comments.

Now that a rating has been issued for all of the critical elements, you have the opportunity to review the ratings that you have issued, as well as make any last changes to the appraisal dates. Once confirmed as accurate, select the **Continue** button.

The **Update Appraisals: Review** screen allows you to review the appraisal data, in a non-editable format. If you must make any revisions, select the **Back** button. Otherwise, select the **Continue** button.

If you must change the main appraiser for the appraisal, select the **Change Main Appraiser** button. Otherwise, select the **Summary Ratings and Comments** button.

The **Summary Ratings and Comments** screen allows you to include your **Summary Rating Overall Comments**, and **Development and Training Comments.** You may type these comments directly into the field, or copy and paste them from a Word document. If you would like to attach any files that will be stored in CHRIS with the completed mid-year, please select the appropriate **Add Attachment** button. Once completed, select the **Save and Continue** button.

Important Note: The **Summary Rating Overall Comments** and **Development and Training Comments** fields will each accept up to 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form. Use of the attachment functionality will allow you to document comments that go beyond the 2,000 character limitation in the field. Attachments made on the **Summary Ratings and Comments** screen will be stored with the completed appraisal in CHRIS.
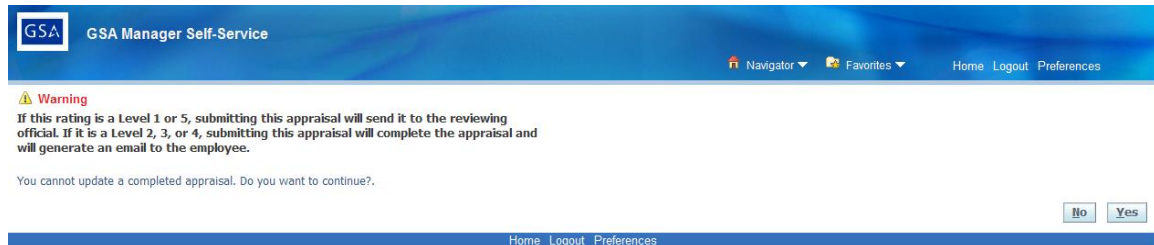
Submitting the Appraisal

You are now viewing the **Final Review** screen. If you have not met with the employee, do not submit the appraisal. Rather, generate a PDF of the appraisal by selecting the **Printable Form** button, which you can share with the employee. Once the meeting has taken place and you are ready to submit, return back to this screen. A 2nd level of approval is not required for mid-year appraisals, so the mid-year will not require approval regardless of the summary rating. However, if you would like to select an approver you have the ability to do so on this screen. You may use the **Comments to Approvers** field to share a message with the approver, and the attachment functionality to attach a file.

Note: Comments to the approver and/or any attached files you provide to the approver on this screen will not stay with the appraisal. They are exclusively for the approver and will not be stored with the completed appraisal in CHRIS. They are used only in the approval process as a means to include additional support to the 2nd level approver.

Once the appraisal is confirmed as accurate, select the **Submit** button.

The **Warning** screen appears, notifying you that a level 1 or 5 will be submitted to a 2nd level approver, and a level 2, 3, or 4 will generate an email to the employee. As mentioned in this guide, a 2nd level of approval is not required for a summary rating level 1 or 5 mid-year. Disregard the warning in the case of the mid-year, and if you are ready to submit the appraisal, select **Yes**.

The confirmation message appears, confirming that the appraisal has been completed.

To continue completing appraisals, look for the next appraisal under **Appraisals in Progress**. If the appraisal has not been created, select the **Build Performance Plan** button to view performance plans and create additional appraisals**.**